



Germany Market Profile

This summary provides the most up-to-date data available on Germany as it relates to their people and economy, travel related motivations and planning behavior and German visitor profile specific to Arizona.

GENERAL COUNTRY PROFILE

POPULATION:

80 million

INFLATION RATE:

0.1%

EXCHANGE RATES (EUR PER USD):

0.885

GROSS DOMESTIC PRODUCT (GDP):

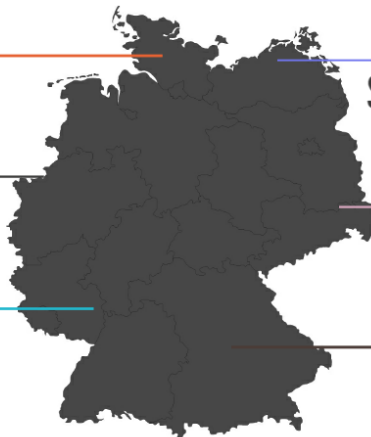
\$3.8 trillion (1.5% annual growth rate)

EXPORTS:

\$1.2 trillion

UNEMPLOYMENT RATE:

4.8%



Source:
The World Fact Book, reporting 2015 data

TRAVEL MOTIVATION AND PLANNING



Top Travel Motivators

42% Cultural Historical Attractions

40% Shopping

38% Dining/ Gastronomy



Source used in Destination selection for last leisure trip

60% Websites via computer or laptop

45% Recommendation from family & friends

37% Information in printed travel guidebooks

27% Advice from travel professionals/travel agents



Advance Decision Time

20% Less than a month

14% 1 to 2 months

34% 3 to 5 months

25% 6 to 12 months

7% More than 1 year



Lodging Reservation made before leaving home

76% Yes

41% Internet Booking Service*

21% The Lodging Establishment Directly

32% Travel Agency/Tour Operator/Travel Club

5% Other

24% No

* assume "Internet Booking Service" is an Online Travel Agency (OTA).



How Air Reservations were Booked

32% Directly with Airline

45% Travel Agency/Tour Operator/Travel Club

22% Internet Booking Service*

7% Corporate Travel Department

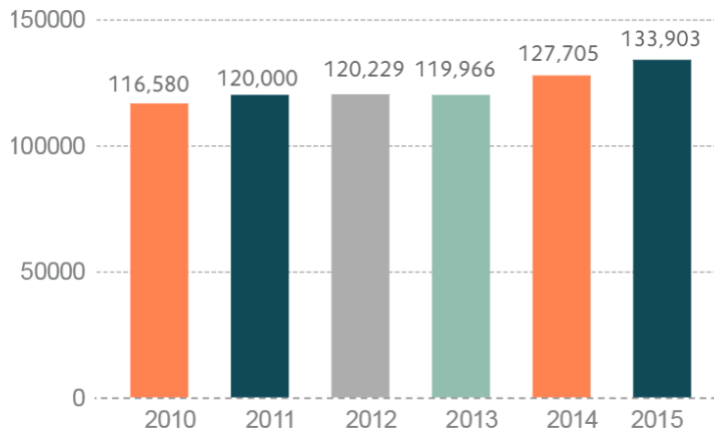
* assume "Internet Booking Service" is an Online Travel Agency (OTA).

Source:
Brand USA, reporting 2014 data
U.S. Dept. of Commerce - NTTO, reporting 2014-15 data

GERMAN VISITATION TO ARIZONA



Visitation Volume to Arizona



Visitor Characteristics

40 years

Average Age

\$102,455

Average Household Income

2.0 persons

Average Party Size



Length of Stay

5.3

Nights per Destination

24.3

Nights in U.S.



Port of Entry

29% Los Angeles, CA

18% San Francisco, CA

8% Las Vegas, NV

7% Chicago, IL

6% Atlanta, GA



Main Purpose of Trip

94% Leisure

81% Vacation Holiday

8.1% Visit Friends/Relatives

3.5% Education

8.6% Business

4.2% General Business

2.9% Convention/Conference/Trade Show

* includes trips with multiple purposes



Transportation in U.S.

74% Rented Auto

41% Air Travel between U.S. Cities

33% City Subway/Tram/Bus

22% Auto, private or company

22% Taxicab/Limousine



Accommodations*

73% Hotel/Motel

20% Private Home

13% Other



Visa Credit Card Travel Spending

German Visa Card Spending ranked #6 in 2015 with 2.8% of total International Travel Spending in Arizona.

By Quarter



Q1: 14%
Q2: 30%
Q3: 38%
Q4: 18%

By Arizona Region



Northern: 40%
Phoenix & Central: 39%
West Coast: 8%
Tucson & Southern: 7%
North Central: 5%

* since this is collected through a survey, there is no indication if this is paid or non-paid.

Source:

Tourism Economics, reporting 2010-2015 data

VisaVUE Travel, reporting 2015 data

U.S. Dept. of Commerce - NTTO, reporting 2014-15 aggregate data